



# Departmental Business Plan and Outlook

Office of Strategic Business Management

Fiscal Years:

2005-06

&

2006-07

Plan Date: January 20, 2006

Approved by:

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## **INTRODUCTION**

### **Department Purpose/Mission Statement**

The Office of Strategic Business Management (OSBM) ensures the maximization and allocation of resources for Miami-Dade County government and alignment of department operations to achieve results driven by policy and customer needs.

### **Department Description**

OSBM brings together the strategic planning, management and budget functions with performance improvement. It is responsible for supporting the County's strategic planning efforts and developing, implementing and effectively managing the County's budget through a refined method (Resourcing for Results) that allocates County funds in a manner that reflects the priorities established through the County's Strategic Plan. The office is comprised of five distinct divisions: Annexation and Incorporation, Management and Budget, Management Planning and Strategy, Performance Improvement, and Revenue Maximization and Grant Coordination. These divisions work together integrating their functions to assist County departments with their grant revenue maximization efforts, strategic planning, quarterly reporting, business planning, and budget development.

### **Annexation and Incorporation**

The Annexation and Incorporation division implements the County's incorporation policy, acts as a liaison with communities desiring to incorporate and contract with the County for services delivery.

### **Management and Budget**

The Management and Budget division develops and implements the County's Resource Allocation Plan (budget) ensuring that financial resources, department operations, and staffing are aligned to achieve results that are driven by policy and customer needs, promoting a Results-Oriented Government linking funding recommendations with priorities outlined in the Strategic Plan and departmental business plans. The division is also responsible for providing annual updates to the County's Five-Year Financial Plan.

### **Management Planning and Strategy**

The Management Planning and Strategy (MPS) division is responsible for the implementation of the County's results-oriented framework that includes an organization wide cultural change focusing on planning, and being accountable for implementation of those plans based on measuring results. This includes developing and facilitating implementation of a strategic plan, business planning, performance measurement, and related management systems. MPS coordinates implementation of a countywide performance management process which focuses on creating and aligning planning, monitoring, and reporting including streamlined departmental quarterly performance reporting, reporting to the community, and comparing County performance data with other

jurisdictions including participation in the International City/County Management Association (ICMA) Center for Performance Measurement.

MPS also assists client departments by administering the secret shopper program, in which employee volunteers “shop” and evaluate various County customer service contact points, and is responsible for survey research including the countywide customer satisfaction survey.

## **Performance Improvement**

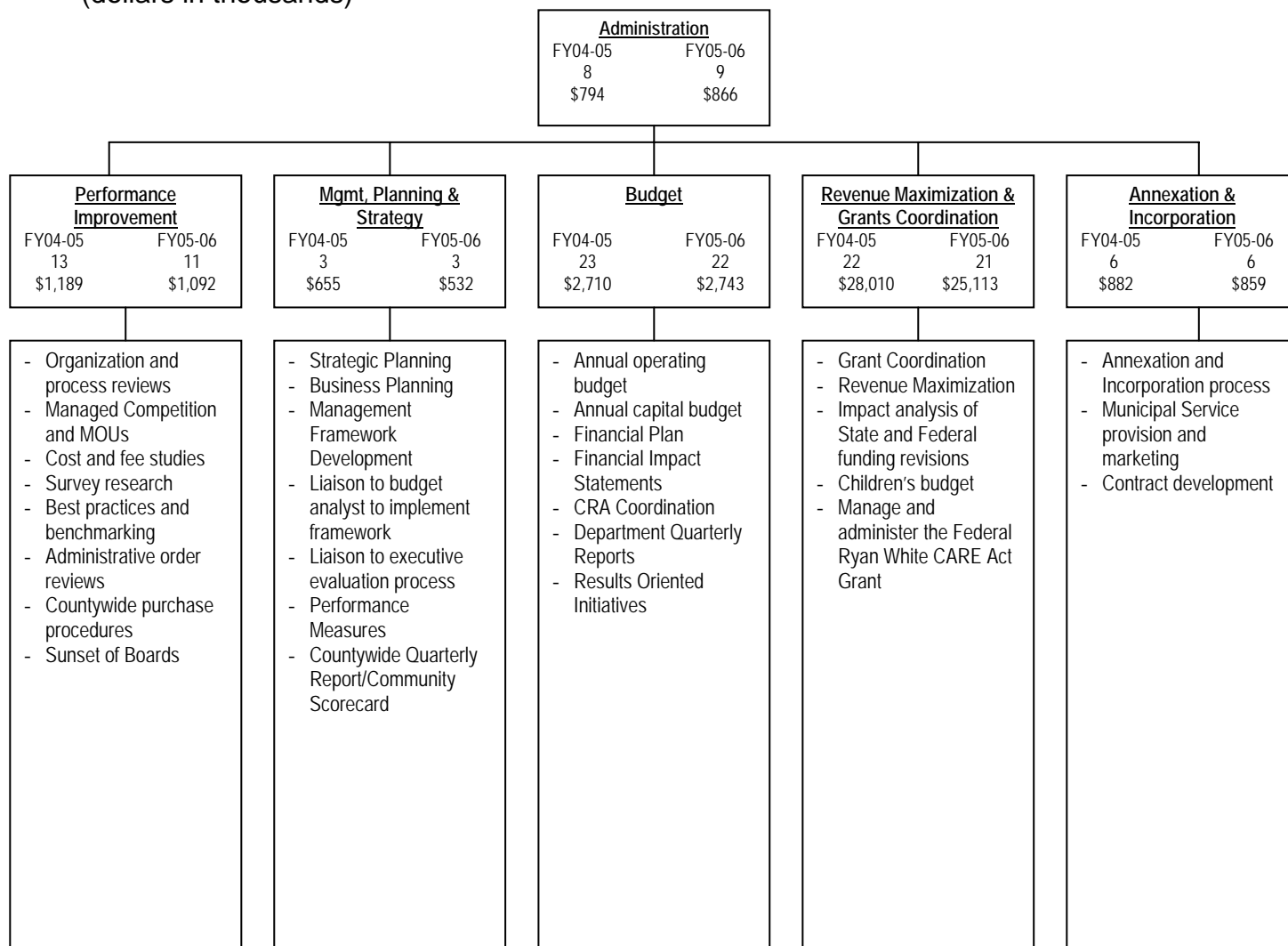
The Performance Improvement Division is the County’s internal management consulting resource, focusing on increasing efficiency and effectiveness of public service delivery. Its specialties range from conducting organizational and business process reviews to the development of gainsharing agreements and the establishment of corporate sponsorships.

## **Revenue Maximization and Grant Coordination**

The Revenue Maximization and Grant Coordination Division proactively identifies opportunities for our community to draw down federal and state funding to support operations. It serves as a countywide resource and knowledge base and provides expertise in assessing potential changes that in the future may impact the County’s continuity of funding. The division is also responsible for preparing the annual Children’s budget and the County’s annual Ryan White grant application, in compliance with all federal requirements, and obligates and contracts all direct Ryan White client service grant funds by July each year.

## Organization and Staffing Issues

(dollars in thousands)



## Staffing Levels

Functional Unit	FY 2004-05	FY 2005-06
Administration	8	9
Annexation and Incorporation	8	6
Management and Budget	23	23
Management, Planning and Strategy	3	3
Performance Improvement *	14	11
Revenue Maximization and Grant Coordination	22	21
<b>Total</b>	<b>78</b>	<b>73</b>

\* Includes one-part time position

## Fiscal Environment

### Revenues and Expenditures by Fund

(All Dollars in Thousands)

Health and Human Service – Ryan White Title I CARE Grant (All dollars in thousands)  
 Ryan White Title I Grant Year (FY 2004-05) runs from 2/28/04 through 3/1/05

	Total Annual Budget		
	Prior Fiscal Year 2004-05 Actual	Current Fiscal Year 2005-06 Budget	Projection as of 12/14/04
<b>Revenues</b>			
Federal Grants	25,074	24,551	24,551
Carryover	1,265	-	-
<b>Total</b>	26,339	24,551	24,551
<b>Expense</b>			
Administration	985	1,227	1,227
Contractual Svcs.	25,354	23,324	23,324
<b>Total</b>	26,339	24,551	24,551

	(Office of Strategic Business Management excluding Ryan White)		
	Prior Fiscal Year FY2004-05 Actual	Current Fiscal Year FY2005-06 Budget	Projection as of 12/14/04
<b>Revenues</b>			
General Funds (Countywide)	3,220	3,564	3,564
General Funds (UMSA)	2,537	2,536	2,536
Proprietary Fees and Bond Funds			
Interagency Transfers	775	557	557
<b>Total</b>	6,532	6,657	6,657
<b>Expense</b>			
Personnel	5,955	5,811	5,811
Other Operating	727	811	811
Capital	-	35	35
<b>Total</b>	6,682	6,657	6,657

Note: Changes in dollars reflect the staffing and performance impacts noted above.

### Equity in pooled cash (for proprietary funds only)

Fund/ Subfund	FY 05 Beginning Year Actual	FY 05 Year-end Actual (Est.)	FY 05 Year-end Budget
<b>SO 720 720</b>	\$0	\$0	\$0
<b>Total</b>	\$0	\$0	\$0

\*The federal grant is on a reimbursement basis. Therefore, during the grant period there is a negative cash balance between \$1 to \$2 Million. At the end of the close-out period, the cash balance is \$0.

## Business Environment

The Office of Strategic Business Management carefully monitors federal and state legislation that may have a potential fiscal impact to the County. The FY 2005-06 Legislative Session has key items that may have a serious impact on Miami-Dade County relating to ad-valorem taxes. OSBM is working closely with our legislative partners to ensure that minimal or no impact is created as a result of these legislative initiatives.

The Ryan White Unit within the Revenue Maximization Division works closely with our federal legislators to ensure continued levels of funding for the program. During FY 2005-06 the unit did face funding impacts as grant funding was reduced by \$1 million. Funding has not been determined as of yet for FY 2006-07. However, our focus for FY 2007-08 continues to be to work closely with our federal counterparts to restore and possibly enhance funding to prior year levels.

The County has been fortunate to achieve a better than expected tax roll performance. During FY 2006-07, it is expected to once again see at least twelve percent growth as a result of the large number of new construction and community revitalization projects. This has mitigated the impact of the tax policy implemented in recent years. OSBM efforts in the areas of Revenue Maximization and Grant Coordination, Management and Budget, and Performance Improvement have also been directed at addressing resource constraints through process efficiencies and the development of alternatives to enhance revenue and reduce expenditures.

Lastly, incorporation and annexation efforts have been growing at a steady rate. The Annexation and Incorporation division has been tasked with not only providing support to the Municipal Advisory Committees but with aggressively promoting and contracting with newly incorporating cities for the use of County services. In addition, the division has been working closely with municipalities on mitigation issues that have the potential of creating a negative fiscal impact to Miami-Dade County.

**Departmental Business Plan and Outlook****Department Name: Office of Strategic Business Management****Fiscal Years: 2005/2006 – 2006/2007****Customer Feedback Plan**

Division	Customer Target Audiences	Purpose of Feedback	Method of Feedback	Implementation of Results	Project Completion Dates
Annexation and Incorporation	Residents Municipalities County Depts.	Measure timeliness of work product Measure alignment with incorporation policy	Direct customer input	Improve quality of work product	After each committee meeting and/or direct interaction with customer
Management and Budget	County Depts. Residents	Measure quality of work product Measure alignment to business and strategic plans	Annual Resource Allocation process and form(s) review meeting Solicit direct customer input	Improve the Resource Allocation Process to meet policy and customer needs	During August of each fiscal year upon the release of the Resource Allocation Plan (Budget Book)
Management Planning and Strategy	County Depts. County Manager' Office Residents	Make continuous improvements to MPS processes and work products	Surveys Recipients of Scorecard and Conduct Focus groups Solicit feedback from departments Completion of Evaluation forms at training workshops	Make improvements to process and work products	Most MPS projects are cyclical (e.g. Business Plan feedback is rolled into improvement in the fall); scorecard feedback is conducted as new scorecard releases occur
Performance Improvement	County Depts. County Manager's Office	Measure quality and usefulness of work product	Solicit feedback from customers	Make improvements to methodology and work products	PI projects occur throughout the fiscal year; feedback is solicited following project completion
Revenue Maximization and Grant Coordination	County Depts. Non-profit and CBOs Grants Web page users and G-mail subscribers Service providers Residents	Measure effectiveness of training, quality and impact of grant writing and technical support/assistance; materials/grant information and revenue maximization strategies and initiatives	Surveys Evaluations G-mail surveys Provider surveys Focus groups Key informant interviews Direct observations	Improve or adjust the quality and quantity of services provided Expand service to meet unmet or emerging needs Identify program strengths and improve service delivery	Surveys and evaluations are completed at the end of each service session or grant assistance workshops



## **Critical Success Factors**

### **Annexation and Incorporation**

- Ability to transition to a contract service model
- Further clarify the Board's policy toward incorporation and annexation

### **Management and Budget**

- Refine the "Resourcing for Results" process to ensure continued alignment with County's priorities as defined in the Strategic Plan
- Continue strong leadership and commitment to maintain emergency contingency reserve strategy
- Align departmental assignments to improve strategic focus
- Assist County Manager's Office in effectively promoting results-oriented government

### **Management Planning and Strategy**

- Implement the performance management software
- Skilled staff support – for completion of KPI methodology review and strategy maps
- Support from County Manager's Office – furthering business planning and performing improvement process
- Support from Employee Relations Department for training curriculum on results-oriented government
- Ensure data integrity – as more decisions are based on measurable results, it is critical to ensure the integrity of the data

### **Performance Improvement**

- Management support for countywide initiatives as well as departmental support for completing and implementing specific efficiency programs
- Work cooperatively with internal support departments such the Enterprise Technology Department (ETSD), the Employee Relations Department, and the Department of Procurement Management
- Fill key vacancies to meet division objectives and developing a skilled professional staff

### **Revenue Maximization and Grant Coordination**

- Level of available funding at federal and state level
- Cooperation and assistance for state agencies with revenue maximization strategies
- Staff's achievement of objectives in a timely and effective manner
- Cooperation by departments and follow-through on their part
- Availability of sufficient staff resources
- Frequency of special assignment, effective grants management and monitoring or programs/projects
- Stability/reliability of County network and web portal
- ETSD support
- Availability of consulting support provided by Ryan White staff to service providers
- Availability of grant funds for maintaining/increasing the number of Ryan White service sites and service providers

## **Future Outlook**

Overall, County government is in good fiscal condition and, assuming reasonable future financial and budgetary policy decisions, should remain so. It is believed that reduction in debt service obligations will have a mitigating effect on the overall fiscal outlook of the County. Largely due to the robust real estate market, the tax roll growth in recent years showed outstanding increases; our five-year planning assumptions include twelve percent growth in FY 2006-07, ten percent in FY 2007-08, 8 percent in FY 2008-09, and 7 percent in FY 2009-10. This growth equates to an average annual rate of 9.23 percent for the next four years.

As Miami-Dade County becomes a more results-oriented government, the importance of performance measures will continue to increase. In future years, Management Planning and Strategy (MPS) staff will continue to pursue policies, methodologies, software and countywide training that continue to enhance data integrity and provide relevant meaningful measures.

Results oriented government efforts have generated program initiatives requiring MPS staff to become actively involved in further enhancing these efforts. The rollout of the 311 Answer Center has generated a great deal of performance data that needs to be reviewed, interpreted, and integrated with quarterly reporting in order to provide departments with information that will prove to be valuable to their operation. Conducting and generating community surveys will be important for future community scorecards. The MPS division will continue providing training in quarterly reporting and business planning development, which are essential to the success of a true Results Oriented Government. As result of these efforts, it will be necessary to consider additional staff in order for the MPS division to be truly effective in its efforts.

The Performance Improvement Division priorities for FY 2005-06 include a comprehensive review of children's services delivery across County government and the community at large, an analysis of Miami-Dade Aviation Department's organizational structure, shared services analysis, internal process reviews, and support for the upcoming update of the Countywide Strategic Plan.

Continued incorporation requires several OSBM divisions to begin helping departments more aggressively market their services to newly forming cities.

As the engine that supports organizational change within the County, OSBM will continue to work with ERD in promoting an integrated performance evaluation system, as well as assist the County Manager's Office and the Board of County Commissioners with the implementation of the Building Better Communities general obligation bond program.

The strategic plan for Miami-Dade County is a five-year plan. During FY 2005-06 an in-depth review of the status of both the performance objectives as well as strategies will be performed. In addition, substantial staff support will be required from other OSBM staff. Budget staff will provide support to this process as changes to the strategic plan that result from this process will guide the resource allocation process in the out years of the plan. The major update to the strategic plan will be completed by FY 2008-09.

## THE PLAN

### Overview

Our FY 2004-05 business plan draws heavily on previously adopted work including the Miami-Dade County Strategic Plan. Miami-Dade County's Strategic Planning initiative is both a plan and a process. The plan provides a framework at a broad Countywide level where we want to go, how we get there, and how we measure our progress along the way. The process ensures increased communications at all levels of County government using consistent terms.

- Our Countywide *Vision of "delivering excellence every day"* communicates the community's shared vision for the best possible future for Miami-Dade County government.
- Our Countywide *Mission* statement communicates the role of our government. Miami-Dade County's mission statement is "*delivering excellent public services that address our community's needs and enhance our quality of life*".
- Our *Guiding Principles* communicate to all levels of our organization the manner in which we expect all decisions, interactions and activities to be performed.
- Our *Strategic Themes* represent what we consider to be the most significant challenges and opportunities facing Miami-Dade County government.
- We have developed *Goals* across all County Departments. These goals provide the direction the County must move in to address the priority strategic themes and help guide us towards the desired future.
- For each goal we have defined a desired *Outcome* or set of outcomes that the County must achieve to be successful in accomplishing the goal. These outcomes are from the customer/community perspective (e.g. quality of service provided, customer satisfaction).
- For each outcome(s), implementing *Strategies* summarize at a broad countywide level the actions that will be taken to achieve the outcome(s).
- *Key Performance Indicators* are the measures that express the County's intentions from the Strategic Plan. Associated *Key Performance Objectives* assign measurable targets and timelines to the key performance indicators while the *Performance Measure* is the specific unit of measure. Departments may develop *Additional Performance Objectives*.
- *Department Programs/Initiatives (may include activities and tasks)* are actions or groups of actions that will be undertaken by a particular department in a specific fiscal year in order to implement a strategy.

As part of the County's Strategic Plan, the Board of County Commissioners endorsed nine priority strategic themes countywide. This Department is primarily supportive of the following strategic themes:

- *Ensure Miami-Dade County operates in a fiscally responsible and stable*
- *Promote cooperation and coordination among all government services*

Supporting these themes are supporting goals and priority outcomes that directly relate to this department. These are provided along with the Department's Programs, Initiatives, and Performance Measures for fiscal year 2005.

**Department-related Strategic Plan Goals:**

- *Enable County departments and their service partners to deliver quality customer service*
- *Ensure the financial viability of the County through sound financial management practices*
- *Deliver on promises and be accountable for performance*
- *Ensure universal access to timely and accurate [health and human services] service information and community resources*
- *Promote independent living through early intervention and support [health and human] services*
- *Ensure high quality standard of care and customer service [in Health and Human Services] Countywide*

**Department-related Strategic Plan Priority Outcomes:**

- *Planned resources to meet current and future operating and capital needs*
- *Alignment of services provided with community's needs and desires*
- *Achievement of performance targets*
- *Accountability to the public at every level of the organization*
- *Continuously improving government*
- *Healthier community*
- *Improved customer care in health and human services*
- *Develop and implement an effective Incorporation/Annexation strategy*